The Personal Va
VIRTUAL ASSISTANT SERVICES



BUSINESS SUPPORT & OPERATIONS PARTNER

Business Systems Audit

A clear-eyed look at what's working, what's not, and what to fix first.

Prepared for	Bloom & Co (sample business)
Prepared by	Nicola, The Personal VA
Date	14 September 2026

Summary scorecard

A quick, at-a-glance view of how each area of your back office is currently performing.

AREA	RATING	SNAPSHOT
Quoting	Amber	Quotes go out reliably, but there's no consistent follow-up process for ones that go quiet.
Scheduling & Workflow Management	Red	Work is tracked across two separate tools, causing double-handling and occasional scheduling clashes.
Invoicing & Payments	Amber	Invoicing is timely, but payment follow-up is manual and inconsistent.
Client Communication	Green	Responsive and personal. Client feedback on communication is consistently positive.
Tools & Tech Stack	Red	Several tools in use don't talk to each other, creating repeated manual data entry.
Automation & Manual Tasks	Red	Multiple manual, repeatable tasks identified with clear automation opportunities.

Green Working well Amber Needs attention Red Priority action

SAMPLE

Key findings

Quoting Amber

Quotes are sent out within 24 hours using Google Docs templates, which is a real strength. But based on your intake answers, roughly 1 in 3 quotes never get a follow-up once sent. There's no system prompting a check-in after 3-5 days. On your current quote volume (around 12/month), that's approximately 4 warm leads a month with no second touchpoint.

Scheduling & Job Management Red

Work is currently tracked in both Google Calendar and a separate Excel sheet, updated manually in both. You mentioned this caused a scheduling clash last month, and based on your workload, this duplicate entry is likely costing around 30-40 minutes a week in re-entry alone, before counting the risk of another clash.

Invoicing & Payments Amber

Invoices go out through Xero within 2 days of work completion, which keeps cash flow relatively healthy. The gap is in payment chasing: you noted overdue invoices are followed up "whenever I remember," with no set reminder schedule, which is likely delaying a portion of your ~$4,000/month in receivables by a week or more.

Client Communication Green

This is a genuine strength. You're responding to enquiries same-day by phone or text, and client feedback (per your intake notes) consistently highlights how personal it feels. This is worth protecting as other systems are improved, the goal is to streamline admin without losing this personal touch.

Tools & Tech Stack Red

Your current stack Google Calendar, Excel, Xero, and email don't sync with one another. This means client details and status updates are typed in at least 3 separate times, which based on your volume adds up to an estimated 2-3 hours a week in avoidable manual entry.

Automation & Manual Tasks Red

Three clearly repeatable tasks were identified from your intake form: invoice payment reminders, booking confirmations, and quote follow-ups. All three are currently done manually (or not at all) but could be automated within your existing Xero and calendar tools with minimal setup.

SAMPLE

Top 3 priorities

Of everything identified in this audit, these three would make the biggest difference first.

1

Stop double-entering jobs in Calendar and Excel

Move tracking into Google Calendar only, using shared notes instead of the spreadsheet. This removes the clash risk and gets back roughly 30-40 minutes a week.

2

Turn on Xero's automatic payment reminders

Xero already supports scheduled reminder emails. Switching this on for overdue invoices would improve consistency on your ~$4,000/month in receivables, at no extra cost.

3

Add a 3-day quote follow-up step

A short templated follow-up sent automatically 3 days after any unactioned quote would help convert more of the ~4 warm leads currently going quiet each month.

SAMPLE

Estimated impact

Based on the findings in this audit, these improvements are likely to deliver the greatest return in time savings, efficiency and cash flow.

Time Savings

Reduce manual admin by 2-3 hours per week

Once duplicate data entry is removed and scheduling runs through a single system, that reclaimed time can go straight back into client work and business growth rather than re-entering the same information twice.

Improved Cash Flow

Consistent, automated follow-up on overdue invoices

Right now, chasing payments happens "whenever there's time." Automating this removes the guesswork, so overdue invoices get followed up the same way, every time without it depending on memory.

Better Lead Conversion

A structured process for quotes that go quiet

Roughly 1 in 3 quotes currently get no follow-up at all. A simple, automatic check-in catches these before they're forgotten turning some of those quiet leads back into real conversations.

Potential Outcome

Small changes in process often create the biggest gains. The recommendations in this audit focus on practical improvements that deliver measurable results without adding unnecessary complexity.

SAMPLE

90-day action plan

Recommended order of implementation based on impact, effort and business priorities.

MONTH 1

Simplify Scheduling

- Remove duplicate job tracking
- Establish one source of truth for scheduling
- Standardise job notes and client information

MONTH 2

Streamline Payments

- Activate automated payment reminders
- Review invoicing workflow
- Create consistent overdue payment process

MONTH 3

Improve Follow-Up Systems

- Implement quote follow-up process
- Create communication templates
- Review results and refine systems

Focus on progress, not perfection.

Implementing a few high-impact improvements consistently will deliver better results than introducing multiple new systems at once.

SAMPLE

Recommended next steps

Suggestions below are matched to your business's size, tech comfort, and budget, starting simple, with room to grow.

Consolidate	Retire the Excel job tracker and keep Google Calendar as the single source of truth, using event notes for job details
Prioritise	Focus first on the scheduling fix and payment reminders. These two alone address the biggest time and cash-flow drains
Standardise	Set up a simple templated quote follow-up email, sent automatically 3 days after an unactioned quote, using your existing Google Docs quote templates as the base
Automate	Turn on Xero's built-in reminder sequence (Day 3, Day 7, Day 14 overdue), with no new tool or cost required
Review	Revisit this scorecard in 3 months to check progress and catch any new manual workarounds creeping back in.

SAMPLE

Want help putting this into action? Every recommendation above can be implemented and then looked after ongoing through one of my support packages.

See all services

The Personal Va
VIRTUAL ASSISTANT SERVICES



Thank you

Thank you for the opportunity to look under the hood of your back office. Every business has a handful of small, fixable things quietly costing time or money. The aim of this audit is simply to make those visible, so you can decide what to tackle first.

If you'd like to talk through any of these findings, or discuss what implementation could look like, **book a time to chat**. I'd love to jump on a call.

Nicola

Founder, The Personal VA

thepersonalva.com